

Information Organization, Usability, Currency & Accessibility (IOUCA) Meeting Minutes

Date: June 20, 2006

Time: 9:00 – 11:00 a.m.

Location: LC II, Room 340

Attendees:

<input checked="" type="checkbox"/> Linda Aguilar (DHS)	<input checked="" type="checkbox"/> Neal Albritton (DOR)	<input checked="" type="checkbox"/> Shayn Anderson (EDD)
<input type="checkbox"/> Steve Branson (DHS)	<input checked="" type="checkbox"/> Donna Freeman (FTB)	<input checked="" type="checkbox"/> Theresa Giles (DHS)
<input type="checkbox"/> Jennifer Harper (DHS)	<input type="checkbox"/> Jeff Hillard (CDFA)	<input checked="" type="checkbox"/> John Jewell (CSL)
<input checked="" type="checkbox"/> Patrick Johnson (DOR)	<input checked="" type="checkbox"/> Richard Lehman (CEAP)	<input checked="" type="checkbox"/> Lee Macklin
<input checked="" type="checkbox"/> Anamarie Malone (DTS)	<input type="checkbox"/> Liz Mechem (Insurance)	<input type="checkbox"/> Frank Montez (DHS)
<input type="checkbox"/> Claudina Nevis (SCIO)	<input type="checkbox"/> Sally Nietering (POST)	<input type="checkbox"/> Joni Ogata (DMHC)
<input checked="" type="checkbox"/> Kristine Ogilvie (CSL)	<input type="checkbox"/> Bill Passavant (DSS)	<input type="checkbox"/> Rob Quigley (SCIO)
<input checked="" type="checkbox"/> John Quijada (DMV)	<input checked="" type="checkbox"/> Deborah Schwartz (CRB)	<input checked="" type="checkbox"/> Brenda Washington (DHS)
<input checked="" type="checkbox"/> Morris Weisbart (CDFA)		

Review Minutes from Previous Meetings

Debbie Schwartz

The minutes for the May 30th and June 13th meetings were approved with no corrections. The minutes for the May 9th, May 16th, and June 6th meetings were approved with minor changes.

State Portal Review Board Meeting

Debbie Schwartz

The State Portal Review Board met Friday June 16, 2006. IOUCA sent the three recommendations on accessibility, usability, and separating content from presentation to the Review Board members that morning and presented the recommendations at the meeting in the afternoon. Kris provided an overview of where IOUCA is in the process.

John presented the recommended accessibility standards. Debbie presented the recommendation to separate content from presentation. Donna presented the usability recommendation. The recommendations were very well received. However, the Review Board wants an accelerated timeline for adoption so departments can move forward in the right direction. John, Debbie, and Claudina are working on the accelerated process.

Communication to State IT Community

Claudina Nevis

Claudina is preparing a memo from Clark Kelso to agency directors, CIOs, AIOs, data center directors, and IT leaders to notify them of the recommendations for use in planning new and redesigned state websites as well as to announce the web accessibility training being provided by DOR. Claudina is planning a meeting for IOUCA to present the recommended standards to state webmasters.

Clark has scheduled quarterly IT Council and IT Leaders meetings. An all-day IT Planning Day is scheduled July 28, 2006. Clark will be meeting with the IT Council that morning. Claudina suggested that IOUCA present the recommended standards to the IT Leaders following the IT Council meeting. The presentation should emphasize that review and revision of the standards is an ongoing process; review and feedback will be welcome after adoption.

Claudina is developing a web contact form to collect information from departments regarding who should be involved and informed about web planning efforts. Claudina wants input from IOUCA to define what contact information she asks for (e.g., webmasters, web developers, content managers, etc.). Information should be available to executives, webmasters, web developers, content managers, public affairs officers, public information officers, and web application developers. Claudina will request 1-3 points of contact within each department. The

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points of contact will be responsible for disseminating information to everyone involved with creating and maintaining their department's website. The contact information will be used for web training opportunities, vetting recommendations, informational updates on standards, etc.

As part of a separate effort, Gary Clark from CalEPA is collecting information about department's use of content management systems. At the next AIO meeting, he will be asking departments what content management systems (if any) they are using.

IOUCA felt that we need a better understanding of the state's web community. Richard Lehman and John Quijada will develop a survey asking departments and agencies:

1. Issues or legal disputes related to their website
2. Web development tools used by the department
 - Goal is to identify competency centers
 - Include content management systems and automated workflows
3. Skill sets
4. Experience
5. Web development process within the department
6. Comment section
7. The survey should include information about what we will do with the results.

Portal Redesign Project Update

Claudina Nevis

Human Factors International (HFI) presented an overview of their activities to the Portal Review Board. They are completing their expert review and planning user testing (will start next week). Three presentations are planned:

1. Expert Review, June 26
2. User Testing Presentation, July 12
3. Executive Review, July 27

IOUCA will be working closely with HFI to gain knowledge transfer of the usability process. Kris Ogilvie and Jeff Hillard will shadow HFI to learn about usability, usability testing, how to develop a script for usability testing, defining personae, etc. One of the contract deliverables will be a report of findings, recommendations for next steps, and making usability part of the culture of state government.

The Portal Redesign Project should have a representative attending IOUCA meetings. Steve Rushing is invited.

California Enterprise Architecture Program (CEAP) Update

Claudina Nevis

CEAP is currently working on:

1. Service Oriented Architecture (SOA)
 - Master Guide
 - White Papers
 - ⇒ Web services
 - ⇒ Security in a shared environment
 - ⇒ Governance in a federated model

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2. Portal

- Common payment service (PRP and CEAP)
- ERP consolidation (SCO, DWR, DOT)
- Information sharing
- GIS
- Collaboration between departments on service centers
 - ⇒ Tax services
 - ⇒ Health services

Status Updates – Recommendations to Review Board

Working Teams

IOUCA will take the recommendations on accessibility, usability, and separating content from presentation to the Portal Steering Committee for adoption on July 14. The standards within the recommendations provide direction for planning new or redesigned state websites. The working group should review the recommendations closely for changes, additions, and corrections. Any real world reviews that have not been completed should start now (many were waiting for finished drafts).

Action Items

Debbie Schwartz

ACTION: The working group discussed the need for a broader implementation plan than what is contained in the recommendation. It was felt that integrated document with next steps should be developed to guide implementation of the recommended standards. John and Debbie will work on this offline.

Assigned To: Debbie Schwartz, John Jewell

Due: June 27, 2006 (Update)

Update: No update.

Future Action Items (Not Scheduled for Review this Week)

ACTION: Develop a list of file types and versions that should be used for California web pages. The list should be prioritized by most desirable and focused on where we want to be in the future rather than where we are now.

Assigned To: Neal Albritton, Steve Branson

Due: June 20, 2006 (Update)

Update: Neal will start developing the list of accessibility requirements for Adobe products.

ACTION: Follow up on the feasibility of using Executive Institute as a vehicle for ongoing training for executives.

Assigned To: Claudina Nevis and Liz Mecham

Due: June 20, 2006 (Update)

Update: Claudina and Liz will determine how Executive Institute could serve as a vehicle for ensuring that executive management understands the business needs for accessible, usable websites as well as what needs to be done to achieve this.

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ACTION: Develop a beginner's version of the workbook.

Assigned To: Neal Albritton

Due: June 20, 2006 (Update)

Update: The draft is complete; the working team will discuss and review the draft.

ACTION: Discuss a process for disseminating information to content providers and webmasters quickly. Prepare a plan to establish ongoing communication with webmasters.

Assigned To: John Jewell

Due: June 27, 2006 (Update)

Update: In progress.

ACTION: Follow up on the feasibility of using GTC as a vehicle for ongoing technical training.

Assigned To: Claudina Nevis and Liz Mecham

Due: October 10, 2006 (Update)

Update: Claudina met with the executive officer of GTC; they were very receptive to working with us. They are looking for some guidance from IOUCA; Claudina will follow up in October after the Web Accessibility Training is complete.

Parking Lot

1. Frame the issue of application accessibility and usability.

Assigned To: Steve Clemons

Due: June 27, 2006 (Update)

Update: It was noted that many online applications are written by consultants; the state may not have the necessary skills to make changes. It was suggested that the two parking lot items be considered as Phase 2. IOUCA will need to work closely with CEAP on the two items.

2. Conduct high level research and frame the issue of accessibility and usability in regards to online forms.

Assigned To: Steve Clemons

Due: June 27, 2006 (Update)

Update: See above.

Next Steps

Kris Ogilvie, Debbie Schwartz

Next IOUCA Meeting: June 27, 2006

Library & Courts II, 900 N Street, Room 340

9:00 – 11:00 a.m.

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Open Issues

Debbie Schwartz

1. How can the state design templates for current technology standards while accommodating departments with a wide range of expertise and software tools?
The Review Board noted that some content management solutions can resolve this issue, but not all departments have strong content management systems in place. DTS is considering offering support. It was recommended at the IOUCA meeting on March 14th that we consider offering a resource gallery of images that can be used by any state department. It would be possible to offer a suite of templates using different color palettes that meet accessibility requirements. Before this can be decided, the issue of single look-and-feel for all California pages vs. multiple look-and-feel with common branding needs to be resolved at a higher policy level.
2. How can California enforce the standards after adoption? ***How will California ensure the application of standards across departments and over time (quality assurance)?****[added 5/2]*
California will likely approach adoption from an incentive perspective rather than an enforcement perspective. An exception is Section 508 compliance, which is mandated by state and federal law.
3. Should tools to implement standards (CSS, templates) be developed for current look and feel as well as new look and feels?
4. Guidelines are not always followed. Would it be better to develop standards only, but drive by level of compliance? For example,
 - Level 1 Standards: Minimal accessibility
 - Level 2 Standards: Moderate accessibility
 - Level 3 Standards: High accessibility*Departments could be encouraged to work toward improving their websites by qualifying for higher levels. The state could provide “paths to accessibility” and could provide training for each level.*
5. What skill sets will be needed to communicate, maintain, and implement the standards, guidelines, and tools the IOUCA is recommending?
6. How do we separate content from HTML (CSS only separates content from presentation)?
This can be done through master templates in Dreamweaver, content management systems, or hard coding. The team needs to determine if this is part of our scope.

Parking Lot

Debbie Schwartz

3. *Frame the issue of application accessibility and usability.*

Assigned To: Steve Clemons

Due: April 18, 2006 (Update)

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***Update:** It was agreed that these two action items are outside the scope of the IOUCA working group. We agreed that it was something we should be aware of. It was suggested that the two items be put in the parking lot for the time being and revisited in about a month.*

4. *Conduct high level research and frame the issue of accessibility and usability in regards to online forms.*

***Assigned To:** Steve Clemons*

***Due:** April 18, 2006 (Update)*

***Update:** See above.*

5. *Content authors may benefit from training and instruction in writing for the web. There is a need for training for content developers. It may be beneficial if the IOUCA could identify these training needs. DHS offers web author training for readability, usability, and targeting information to the specific audience.*